

# TOWN MANAGER EVALUATION

## FY2012

**Select Board Member: Stephanie O’Keeffe**

*For the purposes of this document, the evaluation terms shall be defined as:*

**Commendable** = Performance surpassing reasonable expectations

**Satisfactory** = Performance meeting reasonable expectations

**Needs improvement** = Performance below reasonable expectations, with improvement likely

**Unsatisfactory** = Performance below reasonable expectations, with improvement unlikely

**Unable to judge** = Insufficient information available for evaluation (Please explain)

AREAS OF RESPONSIBILITY	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	COMMENTS
<b><u>FISCAL MANAGEMENT</u></b>						
<b>Annual Expectations</b>						
1. Plans and organizes the preparation of an annual budget.	X					Budget preparation and management has been one of Amherst’s great strengths under John’s leadership as Finance Director and as Town Manager. His own expertise, and the expertise he recruits for and supports throughout the Finance staff is a tremendous asset to the Town. Formal confirmation of this comes from the annual audit and the Town’s strong bond rating.
2. Prepares budget in conformance with the Select Board’s Budget Policy Guidelines memo.	X					
3. Plans, organizes and administers the adopted budget within approved revenues and expenditures.	X					
<b>FY12 Goal</b>						
4. <b>(FY12 Goal #1)</b> The Town Manager shall develop specific <b>recommendations for consideration by the Select Board</b> to address the ongoing revenue challenge, to include: a. generating new revenue; b. reducing expenses through efficiencies in Town structure and service delivery, including regionalization of services where appropriate; c. negotiating contracts through the collective bargaining process that are reflective of the community’s capability and willingness to support, and mindful of the stagnant economy and conservative projections for the next few years; d. pursuing an increased economic development profile to increase the tax base and reduce the burden on residential property taxpayers.	X					Reducing expenses in ways that add value rather than impose hardship have been the key focus the last two years, with strong results, the most recent success being the work to create and implement the recommendation to move retired teachers’ health insurance coverage to the Town from GIC. The continued progress on other such efforts – Regionalization of Emergency Dispatch, reducing and stabilizing electricity costs through the solar project at the old landfill – is much appreciated.  New revenue and increasing the Town’s economic development profile remain works-in-progress, through a variety of important efforts, including working with the BID, the institutions of higher ed and other entities. New revenue to support energy-saving measures will be available beginning in FY13, thanks to successful efforts to earn Green Community status from the State.

AREAS OF RESPONSIBILITY	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	COMMENTS
						The collective bargaining process was successful and well-managed.
<b><u>RELATIONSHIP WITH THE BOARD AND TOWN MEETING</u></b>						
<b>Annual Expectations</b>						
5. Makes professional recommendations to the Board on items requiring Board action.	X					His recommendations, frequently provided as memos with key background and explanatory information, are extremely valuable.
6. Interprets and executes the intent of Board policy.	X					Through his close work with the Select Board, John understands the philosophy behind our actions, decisions, directives and guidance, and he acts accordingly.
7. Maintains a professional, impartial and effective working relationship with the Board.	X					My impression is that the relationship with the full Select Board is extremely positive and productive. John and I work very effectively together, with open and candid communication, and with mutual trust.
8. Presents to Town Meeting with thorough preparation and clear communication.	X					I think this is a particular strength, and a very important one.
<b>FY12 Goal</b>						
9. <b>(FY12 Goal #6)</b> The Town Manager shall keep the Select Board fully informed by: a. responding to and initiating improved communication efforts; b. recognizing that any issue or change that directly or significantly impacts the community falls within the Select Board's authority to provide feedback; c. allowing the Select Board opportunity to provide feedback on policy/practice initiatives and changes before implementation; d. involving the Select Board in the determination of collective bargaining strategies for the current contract process, and keeping us updated on its progress; e. ensuring that all members of the Select Board are aware of anything significant before it appears in the newspaper.	X					<p>Communication with the Board is very good. There's no such thing as "too much" communication, so I will always say that still more is even better. John does a good job at keeping us informed about the things we need and want to know, and doing so in a timely manner.</p> <p>He and I work together to try to ensure that the Select Board's role and input are included in all matters within its purview. He recognizes, respects and embraces our different responsibilities under the Town Government Act.</p> <p>John kept us fully informed and sought our feedback throughout the collective bargaining process.</p>
<b><u>LONG RANGE PLANNING</u></b>						
<b>Annual Expectations</b>						
10. Maintains a knowledge of new technologies, systems and methods, etc. in relation to Town services.	X					John is well-connected to new technology via our IT Dept ,and well-versed in existing and emerging best practices in municipal

AREAS OF RESPONSIBILITY	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	COMMENTS
						government via his connection to the MMA and other industry groups.
<b>FY12 Goals</b>						
11. <b>(FY12 Goal #7)</b> The Town Manager shall provide the Select Board with a detailed assessment of Town-owned buildings regarding their current use, and anticipated future benefit and liability. He will make recommendations on whether or not it is in the Town's best interest to maintain ownership of each one. If any recommendations are to repurpose a building or not maintain its ownership, he will suggest how best to proceed.			X			There has been little demonstrated progress on this.
12. <b>(FY12 Goal #8)</b> The Town Manager shall help Amherst become a greener, more sustainable community by initiating and advocating for new "green" efforts and programs, and he shall inform the Select Board and the community about these efforts and their results.	X					When John became Town Manager, his stated goal was to have Amherst be a leader in everything it does and I believe that his enthusiastic pursuit of important green initiatives is an excellent example of this. Continued pursuit of the solar project at the landfill and the successful completion of a Power Purchase Agreement with Blue Wave; successful achievement of Green Community status, thanks to his recommended creation and filling of a Sustainability Coordinator position; his recommended creation and hiring of the Director of Parks and Grounds position, and his popular and supported recommendation to invest in planting 2,000 new trees all serve and fulfill this goal.
13. <b>(FY12 Goal #9)</b> The Town Manager shall create, through consultation with each department's staff, a recommended staffing plan that suggests the optimal number and types of positions in each department to best address current service levels and key needs. This will provide a framework for prioritizing recommendations for future hiring. Such future recommendations should address the full cost of each position, including post-employment benefits.			X			There has been little demonstrated progress on this. There may have been some lack of clarity about expectations for this, and we'll need to be sure we are all on the same page for FY13.
<b><u>STAFF AND PERSONNEL RELATIONS</u></b>						
<b>Annual Expectations</b>						
14. Models sound personnel procedures and practices in oversight of human resources function.	X					John recognizes the crucial role of human resources in an organization as large and complicated as the Town, and has prioritized that. He has handled individual personnel issues with sensitivity and fairness.

AREAS OF RESPONSIBILITY						COMMENTS
	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	
15. Leads, directs and develops Town staff.		X				See #19 comments
16. Develops good staff morale and loyalty to the Town.		X				See #19 comments
17. Recruits and assigns the best available personnel in terms of their competencies.		X				His hires have been consistently excellent. I have wondered if assigning (or perhaps, more effectively defining and utilizing) an overall "Project Manager" for certain multi-disciplinary and interdepartmental projects would be a useful way to coordinate and troubleshoot all the moving parts; roll-out of the Parking Machines, and the opening of the War Memorial Pool and wading pool are examples. Also, ensuring that all staff are optimally effective in their roles is important.
18. Leads the negotiations of labor contracts representing Town interests and Board guidelines.	X					The collective bargaining process has seemed to occur smoothly and successfully under John's leadership, and the Select Board has been kept well-informed.
<b>FY12 Goals</b>						
19. <b>(FY12 Goal #4)</b> The Town Manager shall make high staff morale a priority. Efforts shall include: a. increasing communication between himself and staff at all levels, in order to inform, engage and solicit feedback; b. encouraging a workplace culture of civility, mentoring and receptivity to new ideas and innovations for improved service delivery.		X				Staff is the Town's most vital resource. They have been through a tough couple of years, fiscally and administratively, and the fiscal challenges continue. Active and specific support of staff is always important, never more so than in such circumstances. That support may have become more passive and general than intended. Many staff consider John to be an excellent manager and leader, and their comments confirm my own observations. I think it is a matter of his taking concrete steps to ensure that all staff feel connected to and engaged with him. Part of that needs to come directly from John to all staff, and part of it needs to happen through Dept. Heads – via the vision and info he provides to them as well as the expectations he sets for them. I have chosen "satisfactory" as the overall rating here because it averages out "Commendable" which applies in many instances, with "Needs Improvement" which applies in others.
20. <b>(FY12 Goal #5)</b> The Town Manager shall conduct an assessment of the Town's Human Resources needs and capabilities, in order to determine how well we are recruiting, hiring, retaining and supporting Town staff, and how aligned we are with best practices in the human resources field. The Town Manager shall inform the Select Board about the assessment results and his plan to address any necessary changes.	X					With a personnel change in this area, the formal assessment was appropriately postponed. However, John's hiring process and choice of a new Human Resources Director are indicative of his vision for the direction the Town needs to go, and are excellent initial steps.

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<b><u>COMMUNITY and INTERGOVERNMENTAL RELATIONS</u></b>						
<b>Annual Expectations</b>						
21. Ensures that an attitude and feeling of helpfulness, courtesy and sensitivity to public perception exists in employees coming in contact with the public.		X				On the whole, I think there is a well-established practice of courtesy and helpfulness in all staff's interactions with the public, and that is certainly commendable. I do think that there needs to be more emphasis and prioritization on the public's experience when interacting with programs and services. Dealings with people are typically positive, but that is not how the great majority of the public touches or is touched by Town government. Unfortunately, things like clean water and strong public safety are taken for granted, so people's opinion of how well the Town functions on their behalf is shaped by unfilled pot holes, the condition or availability of recreational facilities, usability of the parking machines, etc. I think focus on those areas needs improvement, so I'm averaging out the Commendable and the NI with "Satisfactory" overall.
22. Represents the Town to media as Chief Public Relations spokesperson on Town government issues.	X					John does a great job with this, and I think his increased use of press releases has been helpful and effective.
23. Maintains awareness of developments and plans in other jurisdictions, including the colleges and university, that may relate to or affect Town government.	X					Very much in the loop on such issues.
<b>FY12 Goals</b>						
24. <b>(FY12 Goal #2)</b> The Town Manager shall continue to strengthen relationships with UMass and the Colleges, for concrete progress in areas that improve the community's quality of life by: a. mitigating the impacts of a significant student population: on neighborhoods, on demand for public safety resources, on parking and traffic issues, and so forth; b. compensating for the significant amount of non-taxable property; c. pursuing issues of mutual benefit to the Town and the academic institutions	X					I think this goal has, very appropriately, become a major priority of John's leadership. In particular, he has dedicated considerable resources toward addressing neighborhood issues. The new Code Enforcement Officer and the roll-out of the Safe and Healthy Neighborhoods Initiative are concrete steps in this effort. Also, John has committed significant staff to the Campus & Community Coalition, which is extremely helpful.  He is actively engaged with top officials from all three schools on issues of mutual benefit, and is held in high-regard by all.  Increasing the financial compensation by the schools requires a practical framework, and the relationship-building and needs-assessment that John is doing all contribute to that.

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25. <b>(FY12 Goal #3)</b> The Town Manager shall actively engage the community to: a. provide information about Town successes and challenges, and to seek support for initiatives that address the latter; b. gather information about strengths and weaknesses of municipal service delivery	X					<p>John excels at this. He is happy to speak to any groups that invite him and is well-received. He meets with citizens about all manner of concerns. Through his reports at SB meetings, he provides great detail about Town issues. He supports and encourages open public process for new initiatives. He is a strong, active and effective advocate for actions he believes will benefit the Town: with the community, with our State and Federal legislators, with the Mass. Municipal Association, with our local boards and committees, with the Select Board and with Town Meeting. I recognize that some people would prefer he did not advocate or vote at Town Meeting, but I entirely disagree and I think that advocacy in all forms and to all entities about what he believes is best for Amherst is an essential aspect of his job. Additionally, it helps make clear what his priorities are and how aligned those are or are not with those of the Select Board and the community, which is important information. Furthermore, the Town Govt Act explicitly enables him to vote at Town Meeting.</p> <p>Feedback about service delivery is welcomed, but I would like to see more active and specific means of encouraging it.</p> <p>He has dipped his toes in the water of social media through Twitter, and I think efforts like this have great potential for fostering increased information flow and accessibility.</p>
<b><u>GENERAL EXPECTATIONS</u></b>						
26. Feel free to comment on strengths or weaknesses in any of the following areas:		<b>Comments</b>				
Professionalism	Community spirit	<p>Most of these are covered in other areas, and I give John high marks for all.</p> <p>The one that requires special comment is Crisis Management. Last October’s snowstorm and its aftermath was an extraordinary event. The Emergency Operations team, thanks to their training, dedication, and the experience gained on prior smaller-scale incidents, was organized and ready. I was impressed not only with their preparedness and response, but with their focus on lessons learned and how to do better next time. It was not just a well-managed crisis, but an educational opportunity. John and all members of that team deserve tremendous credit.</p> <p>I have been privileged to have a front-row seat for this and smaller incidents – observing in the Emergency Operations Center or being in close contact with John throughout the incident. I was also able to observe a training exercise involving Town officials and public safety personnel, School officials, State emergency management and public safety personnel, UMass public safety personnel and others. In each of these situations, I have been enormously impressed by the training, professionalism and thoroughness of all involved. John supports and is supported by a first-rate network of experts.</p>				
Leadership	Defends conviction under pressure					
Enthusiasm	Openness to differing views/new information					
Accessibility	Resourcefulness					
Setting priorities	Advocacy with State and Federal Government					
Communication style	Crisis management					
Listening skills	Responsiveness					
Public speaking	Facilities management					

AREAS OF RESPONSIBILITY	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	COMMENTS
<b><u>OTHER COMMENTS</u></b>						

27. If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.

Other points not fully captured above:

- The overwhelming majority of the formal and informal feedback I receive indicate that the community is extremely pleased with John's leadership. He is regarded as highly-skilled, friendly, sincere, approachable, responsive, open-minded and fair. I hear similar comments from colleagues in the region and those I've met at MMA. John is widely appreciated and admired.
- John has an outstanding working relationship with School and Library officials, which contributes to cooperative and collegial management across all entities, particularly in financial matters, but in other areas of administrative and technical assistance as well.
- His service on the PVT Advisory Board – currently as Chair -- is extremely valuable for Amherst. The fiscal expertise, knowledge of the State budget and legislative processes, and advocacy skills that he brings to that role benefit us regionally as well as locally.
- Timeliness of some responses to e-mail inquiries from Select Board, staff and the public was noted as needing improvement last year. I think there has been marked improvement in this area, and there's always room for more.

I work closely with John, directly and in many different kinds of meetings and situations. He is learning, adapting and growing in this position. He continues to impress me with his skills and his overall approach to management. It is my pleasure to work with him, and I look forward to his continued progress and success as our Town Manager. I echo with enthusiasm what so many have expressed to the Select Board: We are lucky to have him.